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Implementing Roving Reference during the Fall Semester 2019 at Library West of the University of Florida's George Smathers Libraries

a) Describe the project: goals, objectives, activities, etc.

Library West of the University of Florida's George Smathers Libraries is implementing a pilot roving reference librarian service in the Fall 2019 semester. Library West is the Humanities and Social Sciences library, and it is one of six libraries within the George Smathers Libraries System. It currently staffs the reference desk from 9:00 a.m. to 5:00 p.m., Monday through Thursday, and from 9:00 a.m. to 1:00 p.m. (in person) and 1:00 p.m. to 3:00 p.m. (by phone) on Friday (University of Florida, George Smathers Library, n.d.). The proposed new service is a useful update to traditional reference services. It encourages librarians to leave the comfort of the stationary desk to meet patrons where they are. It does not replace traditional reference services. Rather, it supplements them, hoping to catch patrons who would not normally approach the reference desk. By implementing roving reference tactics, librarians may be able to reach those who are not comfortable asking for help or who do not know where the reference desk is or how it functions. The new roving reference service would involve a reference librarian leaving the library with an iPad and stationing him- or herself in a key, high-traffic area, such as a dormitory lobby or the dining hall. This service seeks both to further library outreach and to provide reference in a new way.

b) State why this project is important (e.g., what need does it address, what will it accomplish, who benefits, how does it support the mission and strategic directions of the library).

Roving or roaming reference challenges the traditional model in which librarians remain stationary while patrons approach them with questions. Roving reference models encourage librarians to meet patrons where they are. It increases the visibility of library services, and it may reach patrons who have reservations or misconceptions about using library or reference services (McCabe & MacDonald, 2011). The mission of the George Smathers Library System, and therefore of Library West, is to "ignite curiosity, serve as the locus of knowledge management, and promote intellectual exchange within our diverse global learning community," (UF, George Smathers Libraries, 2014, p.1). The incorporation of a roving reference model is aligned with this vision, promoting the exchange of knowledge beyond the walls of the libraries.

The purpose of this study is twofold: to determine the effect of roving reference on reaching a larger portion of the UF student body (a longitudinal analysis) and to determine the ideal locations and times of day for this service with the goal of achieving maximum usage by the student body (a short-term study). The study hopes to benefit student populations that may have reservations about using the library or librarian assistance for their research needs as well as students whose fields of study do not require frequent use of the library space. With this new service, these student populations may more readily seek assistance that they may not have otherwise.

c) What are the innovative components of this project?

This project aims to implement a non-traditional reference model into Library West of the George Smathers Libraries. Reference librarians will meet students in locations outside of the library, utilizing portable devices for research assistance. Not only does it reimagine the current reference structure within the library, but it encourages new ways of promoting reference and library services. Roving reference facilitates greater access for those students who may want to utilize reference services but are either unable to visit the library in person or do not know how to do so.

d) Compare and contrast the proposed project to other similar projects in academic libraries.

In 2010, Gadsby & Qian (2012) incorporated a roving reference model in the Albin O. Kuhn Library & Gallery of the University of Maryland, Baltimore County. In this study, the librarians purchased an iPad with both wireless and 3G connectivity to use for roving reference services, and they collected reference desk transactions through the software, Desk Tracker. Gadsby & Qian (2012) determined the best places and times for roving reference librarian placement through observation, and they marketed the service through the library's Facebook page, instruction sessions, and academic departmental meetings.

Also in 2010, McCabe & MacDonald (2011) implemented a roving reference model at the University of Northern British Columbia's library. In this implementation, the librarians also used an iPad for the sessions, and they utilized LimeSurvey to collect reference session statistics. McCabe & MacDonald (2011) compiled statistical data to determine the best times and locations to implement roving reference services. They analyzed the LimeSurvey data to determine the peak times that students seek reference help, and they looked at the server logs of the library to see where on campus students were accessing the library homepage.

This study will utilize an iPad but will use LibAnswers to collect data, as this software already is utilized by Library West to track reference statistics. This project will consider peak reference times statistics derived from LibAnswers, but, like Gadsby & Qian, it will determine locations for roving reference based on observation and perceived user needs. This study also will include a survey, collected annually through Qualtrics, to gather additional data about the students' usage of the library, reference services, and roving librarians.

e) Explicitly describe the resources needed and committed to complete the project and impacts on other departments (e.g., personnel, equipment, supplies, travel, space, training, IT support, preservation, cataloging, other).

The primary resources needed for implementing roaming reference are personnel, technology, money, and time. The technological resources needed for this project include one iPad, a subscription to Qualtrics, and a subscription to LibAnswers software through Springshare. The library already utilizes Qualtrics and LibAnswers. Implementing this project will require all librarians who currently staff the reference desk at Library West to set aside at least two hours each week to provide remote reference services. Additionally, staff will attend an instruction session to become familiar with the technology, format, and expectations of the roving reference model. Finally, staff will create promotional materials to place on the library's Facebook page and on printed flyers strategically placed throughout campus. Other outreach activities, such as instruction sessions, will also be used for promotional purposes. Finally, the project requires the production of a single sign announcing the presence of a roving librarian, which will be utilized during all roving reference sessions.

f) Provide a plan of action for the project. Include a timeline to show that the project can be completed in 12 months, and specify activities and roles to be performed by the principal investigator (PI) and others involved in the project.

The short-term study includes three phases. Phase one consists of gathering current data from the George Smathers Libraries System's employed reference statistics tool, Reference Analytics through LibApps by Springshare. Using this data, Library West will determine the ideal times and locations for roving reference services and will acquire the requisite permissions to implement these services in the preferred locations (e.g. the student center, dining hall, diversity resource center, academic buildings, computer labs, and residence halls). This phase will last three months. Phase two includes training the librarians that will participate in the roving reference service as well as creating and implementing a marketing and communications plan. This phase will last three months. Phase three includes implementing the roving services and collecting data on all

the reference transactions both outside and within the library. This phase will last the entirety of the Fall 2019 semester.

The longitudinal portion of the study will encompass five years. At the beginning of each fall semester, a survey will be provided to participating professors, who will administer the survey to the students in their courses. The survey will inquire about students' average use of the library, reference services within the library, chat reference services, and roving reference services.

Reference Analytics by Springshare will be utilized to collect roving reference interaction data in order to maintain consistency with past collection methods. The data collected on each reference interaction will include the following metrics: date, start time, end time, location, question type (directional, reference, ready reference, etc.), question's READ scale rating, subject area, course title (if applicable), user type (graduate or undergraduate), reference user status (first-time user or veteran), reference librarian name, and the success of the interaction in answering the question on a scale of 1 to 3, with 1 being the least successful and 3 being the most successful. The data will be exported into a Microsoft Excel file for data processing and will be stored within a Dropbox with restrictive access limited only to approved study administrators.

The annual surveys will be collected using Qualtrics and will also reside within the secure Dropbox.

g) If the project is collection specific: Who owns the collection and where is it located? What copyright issues, if any, is the applicant anticipating?

This project is not collection specific, and there are no identifiable copyright issues in incorporating this project as a part of the library's services.

h) Provide a means of measuring the success of the project. What are the expected results, final product, and projected use?

This project will utilize two measurements to determine its success. The first will be a comparison of the number of reference sessions reported during the year prior to the implementation of the roving reference model to the statistics gathered during the first year of its implementation. The second will be the responses to the annual survey. It is expected that the average number of reference sessions will increase as a result of implementing the roving reference model. It is also anticipated that the surveys will increasingly report positive interactions with the library or librarians throughout the continuation of the roving reference model.

This project is intended to shift the approach to reference in Library West. The lead implementers of the roving reference model will produce a paper detailing the methods, results, and lessons learned from implementing the model. Other institutions can make use of this experience and may help develop other innovative ways of bringing library services to the student body.

i) How will the project team disseminate information about the project, and how will it share results?

The project team will develop a report at the end of the first year of the roving reference model's implementation. This report will show the statistical impact, if any, that the model has on the frequency of reference interactions throughout the academic year. Five years after the implementation, the project team will update the original report with data gathered from the surveys and the continued tracking of reference transactions. The final reports will be deposited into the Institutional Repository of the University of Florida.

j) What are the long-term financial implications if the project is successful? For example, if a pilot project using e-book readers is successful, what would be the cost to the Libraries, annually, to support a new loaned e-book reader service?

The potential long-term financial implication of this project mostly involves staff time. If it is determined that the implementation of the roving reference model takes significant time from librarians' other duties, staffing models may need to be adjusted (e.g. hire more part-time staff to be roving librarians, redistribute responsibilities so that reference librarians have more time to rove, etc.). The other financial implications involve maintaining as many working iPads as needed for the program as well as continued subscriptions to LibAnswers and Qualtrics.

k) Provide a plan for what will happen to equipment/supplies purchased with these funds after the project ends.

This project will implement a new, on-going reference services model. Therefore, the staff, equipment, and software will continue to be used beyond the scope of this study. Promotional materials will be reused when appropriate and will serve as templates for future promotional materials.

References:

Gadsby, J. & Qian, S. (2012). Using an iPad to redefine roving reference service in an academic library. Library Hi Tech, 29(4), 1-5. doi:10.1108/07419051211249446

McCabe, K. J. & MacDonald, J. R. W. (2011). Roaming reference: Reinvigorating reference through point of need service. Partnership: the Canadian Journal of Library and Information Science Practice and Research, 6(2), 1-15.

University of Florida, George Smathers Libraries. 2014. Strategic Directions [PDF]. Retrieved from http://uflib.ufl.edu/pers/documents/Strategic-directions-complete.pdf

University of Florida, George Smathers Libraries. n.d. Research Assistance Desk @ Library West. Retrieved from https://cms.uflib.ufl.edu/librarywest/researchassistancedesk

Budget Narrative

l) Provide a detailed explanation for how each expense was calculated.

A pre-owned 16GB iPad4 is currently listed on Amazon.com for $139.99 and on BestBuy.com for $149.99 (as of April 13, 2019). Since Amazon is less expensive than BestBuy, the iPad will be purchased on Amazon. A graphic designer will be contracted to create graphics for the program. It is estimated the designer will need 10 hours to create the materials, and the rate is estimated to be $50 per hour. The total cost for the graphic designer's time is thus estimated to be $500.00. Flyers will be printed at FedEx, which charges $149.99 for 250 flyers. The initial purchase will be for 1000 flyers, costing $599.96. The sign announcing the presence of a roving librarian will also be printed at FedEx. One 16x20" sign costs $21.75. In addition, this program will use two pieces of software to which the George A. Smathers library already subscribes, Qualtrics and the LibAnswers software through Springshare. No extra funds will be needed for these subscriptions.

m) Provide a justification for each expense required to carry out the project.

This proposal includes purchasing an iPad 3 specifically for use of roving reference. If an iPad the library already has were re-appropriated, plans would have to be made for the gap created. For the new roving reference service to garner attention and gain traction, promotional materials will need to be created. A graphic designer will need to be contracted to create digital graphics to be used on social media as well as graphics to be used on hard copies of flyers. Lastly, a sign will need to be created and printed to announce the presence of a roving librarian. This sign will be used during all roving reference sessions so that users will be able to tell at a single glance who the librarian is and what they are doing outside the library building.

n) Provide a detailed explanation of the PI's role vis-à-vis effort (does not qualify as a cost share match).

The PI for this project will do the initial baseline data collection and data analysis. In addition, the PI will create the survey, purchase the iPad, hire the graphic designer, take care of the printing of promotional materials, schedule roving librarians, and manage and analyze subsequent data from the roving surveys and produce reports. The PI is estimated to spend .25 FTE on this project for the initial implementation.

o) Provide a detailed explanation of the contributed cost share by project team members toward the required 10 % matching requirement.

Ten percent of the total cost being requested is $126.17. This amount will easily be covered in personnel costs. The roving librarian will spend two hours per week on roving activities, or .05 FTE. Over the 14-week fall semester, the roving librarian will spend a total of 28 hours on roving activities. Additionally, there will be an instruction session to train the roving librarian on the software and technology. This session will require one hour of both the roving librarian and instructor.

Strategic Opportunities Grant Budget Form 2019-2020

1. Salaries and Fringe

Name of Person	% of effort	Grant Funds	Cost Share	Total
Principal Investigator	0.25	$0.00	$20,000.00	$20,000.00
Roving Librarian	0.05	$0.00	$2,500.00	$2,500.00
		$0.00	$0.00	$0.00
		$0.00	$0.00	$0.00
		$0.00	$0.00	$0.00
SUBTOTAL		$0.00	$22,500.00	$22,500.00

2. Equipment

Item	Quantity times Cost	Grant Funds	Cost Share	Total
iPad 4	1 x $139.99	$139.99	$0.00	$139.99
		$0.00	$0.00	$0.00
		$0.00	$0.00	$0.00
		$0.00	$0.00	$0.00
		$0.00	$0.00	$0.00
SUBTOTAL		$139.99	$0.00	$139.99

3. Supplies

Item	Quantity times Cost	Grant Funds	Cost Share	Total
Flyers	1000 x $149.99 per 250	$599.96	$0.00	$599.96
Sign	1 x $21.75	$21.75	$0.00	$21.75
		$0.00	$0.00	$0.00
		$0.00	$0.00	$0.00
		$0.00	$0.00	$0.00
SUBTOTAL		$621.71	$0.00	$621.71

4. Travel

From/To	# of people/# of days	Grant Funds	Cost Share	Total
		$0.00	$0.00	$0.00
		$0.00	$0.00	$0.00
		$0.00	$0.00	$0.00
		$0.00	$0.00	$0.00
		$0.00	$0.00	$0.00
SUBTOTAL		$0.00	$0.00	$0.00

5. Other (Vendor costs, etc. Provide detail in Budget Narrative section.)

Item	Quantity times cost	Grant Funds	Cost Share	Total
Graphic Designer	10 hours x $50 per hour	$500.00	$0.00	$500.00
		$0.00	$0.00	$0.00
		$0.00	$0.00	$0.00
		$0.00	$0.00	$0.00
		$0.00	$0.00	$0.00
SUBTOTAL		$500.00	$0.00	$500.00

	Grant Funds	Cost Share	Total
Total Direct Costs (add subtotals of items 1-5)	$1,261.70	$22,500.00	$23,761.70

Data Management Plan

Creators: Mallory Blasingame, Rebekah Boone, William Brandon, Amy Bulgrien Eshgh, Nitra Eastby
Affiliation: University of Tennessee, Knoxville
Template: Digital Curation Centre (DCC)
Project abstract: This project involves the planning, implementation, and evaluation of a roving reference service at Library West, a member of the University of Florida George Smathers Libraries system.
Last modified: 04-16-2019

DATA COLLECTION

What data will you collect or create?

Data will be collected using two instruments: 1) an annual Qualtrics survey about roving reference experiences in general, to be completed by all students enrolled in courses with participating professors, and 2) a brief, on-the-spot Springshare LibAnswers form that librarians will use to capture information on each individual reference interaction. The annual survey will ask students to respond to questions on their average use of the library, reference services within the library, chat reference services, and roving reference services. Data points to be captured during the roving reference interaction include the date, start time, end time, location, question type (directional, reference, ready reference, etc.), question's READ scale rating, subject area, course title (if applicable), user type (graduate or undergraduate), reference user status (first time user or veteran), reference librarian name, and rating of the success of the interaction. The Qualtrics and LibAnswers tools provide a platform for easily capturing and storing the data, which will also be exported and saved in csv files in the University of Florida's DropBox cloud storage system. The University of Florida provides 1 terabyte of DropBox storage, providing ample storage space for the amount and type of data we will be collecting and allowing for long-term retention of the data in a secure cloud location.

How will the data be collected or created?

The data will be collected using Qualtrics and LibAnswers software. The in-class surveys will be completed using classroom laptops, while the reference interaction data collection form will be completed via the roving reference iPad. The field names in the collection forms will be defined using best practices, such as avoiding spaces, limiting the number of characters, avoiding repetition, and using consistent codes to identify the form to which each field applies. Exported data files will be saved in folders separate from any analyzed data files and clearly organized by date and data collection type (i.e., annual survey or reference interaction data collection). Again, naming of the files will follow best practices, including appending the date of export in yyyymmdd format, using underscores instead of spaces, and using descriptive file names. All annual surveys will be self-completed by the students, eliminating the potential for transcription errors, and librarians will quickly verify the data collected in their roving reference interactions with the patron to ensure accuracy. When possible, responses will be limited to pre-defined values in the data collection instruments to eliminate unnecessary variation, and fields most important for data analysis will be marked as required for submission. The team consulted data collection instruments used in previous studies when developing the surveys to ensure question validity and enable comparison of results with previous findings.

DOCUMENTATION AND METADATA

What documentation and metadata will accompany the data?

Metadata for the research data will be stored in XML files using the Data Documentation Initiative (DDI) schema. DDI has mapped relationships to other metadata standards, allowing for the recording of administrative, descriptive, and structural metadata as appropriate. The metadata will describe the data set and relevant information such as the creators, dates of collection, access conditions, data collection methodology, and software. The data dictionaries will be exported from the data collection systems to provide full representation of all survey items and response options. Supporting documentation will also describe any analyses performed to enable reanalysis.

ETHICS AND LEGAL COMPLIANCE

How will you manage any ethical issues?

Informed consent will be obtained from each participant via the Qualtrics and LibAnswers instruments; these forms will be approved by the University of Florida Institutional Review Board prior to initiation of the study. The consent form will communicate that data will be preserved long-term and will explain how data may be shared in the future. No identifying data will be collected from students. Librarian names will be associated with their reference interaction records, but they will be indicated in the data collection instrument with a unique number, and the individuals' names will be stored in a separate form not to be shared outside of the study team. Qualtrics does automatically capture IP addresses, but they will not be stored in our exported data set or shared outside of the study team.

How will you manage copyright and Intellectual Property Rights (IP/IPR) issues?
Copyright and intellectual property rights will be managed in compliance with the requirements of the University of Florida. Data will be shared to the extent granted by any applicable policies.

STORAGE AND BACKUP

How will the data be stored and backed up during the research?
The data will be stored in the data collection systems and regularly backed up through export to DropBox. DropBox automatically backs up all uploaded files and provides recovery options to protect against data loss. The PI will be responsible for ensuring data is extracted and stored on a regular schedule and for maintaining version control. Additionally, a second team member will be given full access in the event that the PI is unable to fulfill these responsibilities.

How will you manage access and security?
There is very minimal risk that any confidential information will be disclosed through this study due to the type of data being gathered. However, we will still take precautions by storing data in university-managed storage locations and limiting access only to those who need it (i.e., the PI, the roving reference librarians, and other key study personnel). Data will be entered directly into Qualtrics and LibAnswers, reducing the risk of data loss or breach of confidentiality associated with paper forms.

SELECTION AND PRESERVATION

Which data are of long-term value and should be retained, shared, and/or preserved?
All collected data and supporting metadata/readme files, except for IP addresses collected by Qualtrics, will be retained in long-term storage. Names of the librarians associated with each reference interaction will be stored internally but will not be shared externally to maintain privacy and because this data point is unlikely to have generalizable utility. Possible reasons for future data sharing could be comparing results over time, conducting external validation/replication studies, or performing meta-analysis or other combined/comparative analyses of roving reference programs at multiple institutions.

What is the long-term preservation plan for the dataset?
The dataset will be stored long-term in UF DropBox cloud storage, as well as a secure IT-managed network drive. The university provides sufficient storage capacity to maintain long-term storage in these locations free of additional charge, based on current policies.

DATA SHARING

How will you share the data?
The deidentified dataset and supporting metadata and other documentation will be deposited in Zenodo and made available for download. The downloadable dataset may be curated to aggregate data fields to reduce the already low likelihood of identification and to eliminate any institution-specific fields (e.g., librarian names). A persistent identifier will be assigned to the dataset through this process to allow for citation/acknowledgement. A data access statement will also be included with any publications describing how to access the data.

Are any restrictions on data sharing required?
We plan to make the deidentified/curated dataset freely available in accordance with the policies students and other users will have agreed to in the informed consent document. Access to the data may be subject to an initial embargo period of ~6 months to allow time to analyze and disseminate our findings. Researchers reusing the data will be asked to agree to responsible use and cite our Zenodo record in any resulting publications

RESPONSIBILITIES AND RESOURCES

Who will be responsible for data management?
The PI will have primary responsibility for implementing the DMP and ensuring that all outlined documentation and backup processes are conducted and will also be responsible for depositing the dataset in Zenodo and approving and attaining the proper documentation for any data sharing requests. A member of the key study personnel will be assigned as backup for these functions. Other members of the study team, including roving reference librarians and affiliated faculty members, will also be responsible for collecting data and ensuring data quality.

What resources will you require to deliver your plan?
Required resources include FTE effort for data capture, initial and ongoing maintenance and oversight of the dataset, and preparation of the dataset for sharing, as well as any costs that may arise to maintain long-term storage. An iPad will be purchased for roving reference interaction data collection. Additional expenses may include costs of consultation on data preservation practices and legal considerations for data sharing, as well as effort from a statistician for data analysis.